

Health Insurance Counseling and Advocacy (HICAP) Aggregate Report

Program: PSA 28 - Senior Advocacy Services

From: 07/01/2011 To: 06/30/2012

Public and Media Data Report

	JUL-SEP Q1	OCT-DEC Q2	JAN-MAR Q3	APR-JUN Q4	TOTAL
Type of Activity					
Interactive Presentations to Public in Person					
Total Number of Events	5	8	7	14	34
Estimated Number of Attendees	155	251	144	349	899
Estimated Number of Persons Provided Enrollment Assistance	0	0	0	30	30
Booths or Exhibits at Fairs or Special Events					
Total Number of Events	0	1	1	1	3
Estimated Number of Attendees	0	150	150	50	350
Estimated Number of Persons Provided Enrollment Assistance	0	0	0	0	0
Mobile InfoVan Events					
Total Number of Events	0	0	0	0	0
Estimated Number of Attendees	0	0	0	0	0
Estimated Number of Persons Provided Enrollment Assistance	0	0	0	0	0
Dedicated Enrollment Events					
Total Number of Events	0	0	0	0	0
Estimated Number of Attendees	0	0	0	0	0
Estimated Number of Persons Received Any Enrollment Assistance	0	0	0	0	0
Enrollment Assistance with Medicare Programs(s)	0	0	0	0	0
Enrollment Assistance with Part D	0	0	0	0	0
Enrollment Assistance with LIS	0	0	0	0	0
Enrollment Assistance MSP	0	0	0	0	0
Enrollment Assistance with Other Medicare Program	0	0	0	0	0
Radio Shows Live or Taped (Not a Public Service Announcement)					
Total Number of Events	0	0	0	0	0
Estimated Number of Attendees	0	0	0	0	0
TV/Cable Shows Live or Taped (Not a Public Service Announcement)					
Total Number of Events	0	0	0	0	0
Estimated Number of Attendees	0	0	0	0	0
Other Electronic Events (Public Service Announcements (Radio/TV), Ads, Crawls, etc.)					
Total Number of Activities	0	0	0	0	0
Estimated Number of Persons Reached	0	0	0	0	0

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Other Print Activity (newspaper articles, fliers, phamplets, etc.)					
Total Number of Print Activities	0	0	0	0	0
Estimated Number of Targeted Persons Reached	0	0	0	0	0
Presenters					
HICAP Paid Staff					
Total Presenters	0	0	2	7	9
Total Hours for Length of Activities	0.00	0.00	4.00	22.20	26.20
HICAP In-Kind Paid Staff					
Total Presenters	0	0	0	0	0
Total Hours for Length of Activities	0.00	0.00	0.00	0.00	0.00
HICAP Volunteer Staff					
Total Presenters	0	0	0	3	3
Total Hours for Length of Activities	0.00	0.00	0.00	7.30	7.30
Other Presenters					
Total Presenters	5	9	6	6	26
Total Hours for Length of Activities	19.30	28.18	25.40	12.40	85.28
Area of Focus					
Dual Eligible with Mental Illness	4	6	6	9	25
Employer Termination - COBRA	0	0	1	5	6
General HICAP Information	0	0	0	0	0
Grievances / Appeals - Plan Issues	5	9	8	15	37
Long-Term Care / Insurance	0	0	0	0	0
Low Income Subsidy (LIS) / Application Assistance	1	2	0	1	4
Medicare (Parts A & B)	3	7	6	11	27
Medicare Advantage (Part C)	5	9	7	12	33
Medicare Fraud / Abuse	5	8	6	11	30
Medicare Prescription Drug Coverage (Part D)	5	6	1	8	20
Medigap / Medicare Supplements	5	7	7	12	31
Non-Medicare Fraud/Abuse	5	8	6	11	30
Other Topics / Issues (Health Specific)	0	0	0	1	1
	4	8	7	9	28

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	JUL-SEP	OCT-DEC	JAN-MAR	APR-JUN	TOTAL
	Q1	Q2	Q3	Q4	
Partnership Recruitment	0	0	0	0	0
Preventive Care Benefits	3	6	3	6	18
QMB/SLMB/QI	5	9	7	12	33
Volunteer Recruitment	0	1	2	1	4
Targeted Audience					
African American	3	5	1	4	13
American Indian or Native Alaskan	0	0	0	0	0
Asian Indian	0	0	0	0	0
Caucasian	5	9	8	11	33
Chinese	3	3	0	0	6
Disabled	5	8	6	14	33
Dual Eligible Groups	2	3	3	7	15
Employer Related Groups	0	0	0	0	0
Family Member/Caregiver of Beneficiary	4	8	5	11	28
Filipino	1	4	1	0	6
Guamanian or Chamorro	0	0	0	0	0
Hispanic / Latino	2	3	4	8	17
Hmong	0	0	0	0	0
Japanese	0	1	0	0	1
Korean	0	0	0	0	0
Low Income	4	8	6	12	30
Medicare Beneficiaries	5	9	7	15	36
Medicare Pre-Enrollees	2	6	5	10	23
Mental Health	0	1	2	6	9
Mental Health Professionals	0	0	1	2	3
Native Hawaiian	0	0	0	0	0
Other	0	0	0	3	3
Other Asian	1	2	1	1	5
Other Pacific Islander	0	0	0	0	0
Partnership Outreach	0	0	1	2	3
Presentations to Groups in Language Other than English	0	0	2	7	9
Rural	0	2	4	10	16
Samoan	0	0	0	0	0
Social Work Professionals	1	4	4	14	23
Some Other Race or Ethnicity	0	0	0	2	2
Vietnamese	0	1	0	0	1

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	JUL-SEP Q1	OCT-DEC Q2	JAN-MAR Q3	APR-JUN Q4	TOTAL
Web Site Hits					
Total Web Hits to Local HICAP Web Site	0	0	0	0	0
Literature from Events					
General HICAP Brochure	170	451	296	754	1,671
"Taking Care of Tomorrow"	0	0	1	0	1
Other Publications (Created by or on Behalf of Local HICAP)	262	524	272	1,130	2,188
Other Literature					
Other Literature	0	0	0	0	0
Brochures from Quick Call	0	1	0	0	1

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Client Contacts & Demographics

	JUL-SEP Q1	OCT-DEC Q2	JAN-MAR Q3	APR-JUN Q4	TOTAL
SECTION 1 - Client Contacts					
Total Clients Counseled (unduplicated)	184	568	298	234	1,284
Total Finalized Intakes	71	94	98	77	340
How did client learn about SHIP/HICAP?					
Agency (Social Security, Medi-Cal, etc.)	14	13	25	20	72
Aging into Medicare Postacd - CDA HICAP	5	5	0	0	10
CDA HICAP	1	1	1	1	4
CHA	0	0	0	0	0
CMS/Medicare	6	3	3	8	20
Friend/Relative	6	11	12	21	50
InfoVan	0	0	0	0	0
Internet	1	0	0	0	1
Mailings	7	6	1	0	14
Media	1	1	0	0	2
Other	18	19	32	12	81
Presentations	2	6	2	4	14
Previous Contacts	7	21	12	8	48
State Website	1	0	0	0	1
Missing/Not Collected	2	8	10	3	23
Mode of Client Contact					
Quick Call Contacts	131	614	270	324	1,339
Contacts by Telephone	20	24	27	76	147
Contacts In Person at home	2	4	0	1	7
Contacts In Person at site	56	67	74	37	234
Contacts by E-Mail	2	2	1	4	9
Contacts by Mail/Fax	0	7	7	16	30
Total Number of Client Contacts:	211	718	379	458	1,766
Contact Status Types					
General info	44	48	60	96	248
Detailed Assistance	33	64	51	72	220
Problem Solving/Resolution	7	7	12	60	86
Total Counseling Time Spent by Counselor Type					
Program Manager	0.30	1.45	3.20	40.55	45.50
Volunteer	20.10	80.15	14.00	19.40	133.65
Paid	2.00	0.30	29.30	8.00	39.60
In-Kind	0.00	0.00	0.00	0.00	0.00
SECTION 2 - Client Demographics					
Ethnicity					
(Hispanic/Latino)	3	1	1	5	10
Race					
African American/Black	4	4	0	1	9

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Client Contacts & Demographics

	JUL-SEP	OCT-DEC	JAN-MAR	APR-JUN	TOTAL
	Q1	Q2	Q3	Q4	
American Indian/Alaskan Native	0	0	0	1	1
Caucasian/White	44	50	62	29	185
Native Hawaiian	0	0	0	0	0
Guamanian or Chamoro	0	0	0	0	0
Samoan	0	0	0	0	0
Asian Indian	0	0	0	0	0
Chinese	0	2	0	0	2
Filipino	1	3	0	1	5
Japanese	0	0	1	0	1
Hmong	0	0	0	0	0
Korean	0	0	1	0	1
Vietnamese	0	1	0	2	3
Other Pacific Islander	0	0	0	0	0
Other Asian	1	0	0	1	2
Two or More Race	0	0	0	0	0
Some Other race	0	0	1	3	4
Not Collected	21	34	33	39	127
Gender					
Female	47	51	62	42	202
Male	19	28	27	21	95
Not Collected	5	15	9	14	43
Monthly Income					
Less than 150% of FPL	9	15	18	23	65
Equal To/Greater than 150% of FPL	38	48	46	21	153
Not collected	24	31	34	33	122
Client Asset Limits					
Below LIS Asset limit	2	5	11	7	25
At or Above LIS Asset Limit	3	0	2	2	7
Not Collected	66	89	85	68	308

From: 07/01/2011 To: 06/30/2012

Client Contacts & Demographics

	JUL-SEP Q1	OCT-DEC Q2	JAN-MAR Q3	APR-JUN Q4	TOTAL
Total Clients that Checked Yes as Being					
Veteran	0	4	2	0	6
Limited English Proficient (LEP)	3	3	0	7	13
Dual Eligible	7	9	13	22	51
Medicare Status Due to Disability	5	4	16	26	51
Dual Eligible due to Mental Disability	0	0	1	6	7
Applying/Receiving Social Security/Medicare Disability	9	3	13	25	50
Age					
Under 60	7	4	9	3	23
60-64	0	1	10	6	17
65-74	41	48	48	19	156
75-84	10	22	12	8	52
85+	3	7	9	6	25
Not Collected	10	12	10	35	67
Marital Status					
Married	21	28	23	16	88
Never Married	6	11	13	8	38
Separated	0	0	1	0	1
Divorced	8	7	9	1	25
Widowed	9	9	16	10	44
Domestic Partner	0	1	0	0	1
Not Collected	27	38	36	42	143
Estimated Financial Saving					
Clients with Financial Savings	7	4	5	16	32
Estimated Dollars Saved	\$2,870.40	\$2,401.00	\$3,350.00	\$25,636.00	\$34,257.40

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	Topics/Needs Discussed				
	JUL-SEP	OCT-DEC	JAN-MAR	APR-JUN	
	Q1	Q2	Q3	Q4	TOTAL
Medicare Parts A&B (Original Medicare)					
Enrollment/Eligibility/Screening	37	47	51	35	170
Benefit Comparisons/Explanation/Coverge Changes	32	55	61	32	180
Appeals/Grievances	1	1	0	0	2
Billings/Claims	5	5	2	4	16
Fraud/Abuse	15	21	21	24	81
Quality of Care	0	0	0	2	2
LTC/LTCI					
Enrollment/Eligibility Assistance	0	1	2	3	6
Billings/Claims	0	0	0	0	0
LTC Partnership	0	0	0	1	1
Appeal/Greivances	0	0	0	0	0
Fraud/Abuse	0	0	0	2	2
Other LTC	1	0	0	1	2
Medigap/Supplement/SELECT					
Enrollment/Eligibility/Screening	27	41	42	31	141
Benefit Explanation	28	46	55	31	160
Appeals/Grievances	0	0	0	2	2
Billings/Claims	3	1	0	3	7
Fraud/Abuse	0	0	0	13	13
Disenrollment/Coverage Changes	0	3	0	0	3
Quality of Care	0	0	0	0	0
Plan Comparison	16	35	41	19	111
Marketing/Sales Complaints/Issues	0	0	1	0	1
Plan Non Renewal	0	0	0	0	0
Medicare Advantage (e.g., MSA, HMO, PPO, Specialty Plans)					
Eligibility/Screening	26	47	47	29	149
Benefit Explanation	30	55	55	33	173
Appeals/Grievances	0	0	0	3	3
Billings/Claims	0	0	2	8	10
Fraud/Abuse	0	0	0	14	14
Coverage Changes/Disenrollment	3	13	4	1	21
Plan Non Renewal	0	4	1	0	5
Plan Comparison	15	39	42	18	114
Enrollment/Enrollment Asistance	1	3	0	11	15
Quality of Care	0	0	0	3	3
Marketing/Sales Complaints or Issues	0	0	0	1	1
Medi-Cal					
Medi-Cal Screening (SSI, Nursing Home)	5	4	6	4	19
Medi-Cal Application Assistance	5	3	5	12	25

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	Topics/Needs Discussed				TOTAL
	JUL-SEP Q1	OCT-DEC Q2	JAN-MAR Q3	APR-JUN Q4	
MSP Screening (QMB, SLMB, Q-1)	5	4	21	19	49
MSP Application Assistance	2	2	3	7	14
Medi-Cal/QMB Claims	0	2	2	1	5
Fraud/Abuse	0	0	0	4	4
Other	4	3	4	2	13
Other					
Employer/Federal Health Benefits (FEHB)	14	10	8	12	44
Military Benefits	1	0	0	1	2
COBRA	1	0	1	2	4
Mental Health Topics	0	0	0	1	1
Fraud/Abuse	0	0	0	4	4
Other Health Insurance	2	0	0	4	6
Other	0	1	1	1	3
Part D - Medicare Prescription Drug Coverage					
Benefit Explanation	41	61	65	40	207
Eligibility/Screening	31	40	40	31	142
Plan Comparison	20	49	49	27	145
Enrollment/Anrollment Assistance	0	11	5	19	35
Billings/Claims	1	1	1	0	3
Coverage Changes	8	17	11	4	40
Re-enrollment	1	0	0	0	1
Disenrollment	0	0	0	2	2
TROOP	0	1	0	0	1
Other	1	3	0	1	5
LIS / Extra Help					
Eligibility / Screening	7	8	26	22	63
Benefit Explanation	2	7	24	22	55
Application Assistance	1	6	16	14	37
Claims/Billings	0	0	0	0	0
Appeals / Grievances	0	0	0	0	0
Other Prescription Drug CoveragePlans					
Union/employer	3	1	1	2	7
PPARx	1	0	0	0	1
Military Drug Benefit	0	1	0	1	2
Manufacturer Program	0	0	0	0	0
Other	0	5	1	0	6
Part D Plan Problems					
(Non-Compliance Services Unmet)					
Eligibility	1	0	1	1	3
Lag Time	0	0	0	0	0
Multiple Enrollment	0	0	0	0	0
Poor Training of Agents	0	0	0	0	0
Poor Training of CSR	0	0	0	0	0

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	Topics/Needs Discussed				
	JUL-SEP	OCT-DEC	JAN-MAR	APR-JUN	TOTAL
	Q1	Q2	Q3	Q4	
Fraud/Abuse	0	0	0	0	0
Marketing Fraud/Abuse	0	0	0	0	0
Agent fraud/abuse	0	0	0	0	0
Formulary problems/changes	0	0	0	0	0
Dosage problem	0	0	0	0	0
Data problems	0	0	0	0	0
Delay in medications	0	0	0	0	0
Incorrect Co-Pay/Can't Afford Co-Pay	0	0	0	0	0
Client reached donut hole	1	1	0	0	2
SSA Premium withheld	0	0	0	0	0
Appeals/Grievances	1	0	0	0	1
Quality of Care	0	0	0	0	0
Plan Non Renewal	0	0	0	0	0
HICAP Legal Services					
Referrals to HICAP Legal	0	0	0	0	0
Legal Clients Served	0	0	0	0	0
Cases Opened	0	0	0	0	0
Cases Closed	0	0	0	0	0
Favorable Closed Case Results	0	0	0	0	0
Client Representation Hours	0	0	0	0	0
Consultation to Program Hours	0	0	0	0	0
HICAP Legal Clients that Saved	0	0	0	0	0
Estimated Financial Savings	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

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Complaints Filed

	JUL-SEP	OCT-DEC	JAN-MAR	APR-JUN	
	Q1	Q2	Q3	Q4	TOTAL
Medicare Part D Complaints Filed					
CDI:	0	0	0	0	0
CMS:	0	0	0	0	0
Part D Plan:	0	0	0	0	0
SMP:	0	0	0	0	0
Urgent Fax:	0	0	0	0	0
800 Medicare:	0	0	0	0	0
Other:	0	0	0	0	0
TOTAL MEDICARE PART D COMPLAINTS	0	0	0	0	0
All Other Complaints					
APS :	0	0	0	0	0
CDI:	0	0	0	0	0
CMS:	0	0	0	0	0
QIO:	0	0	0	0	0
SMP:	0	0	0	0	0
Other:	0	0	0	0	0
TOTAL ALL OTHER COMPLAINTS	0	0	0	0	0
800 Medicare Line Issues					
Total number of Calls with Issues	1	0	1	0	2
Total duration of calls	0.15	0.00	0.15	0.00	0.30